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ABSTRACT

England and Wales have undergone dramatic educational reforms during the 1980s and 1990s. This paper presents findings of a study that explored three headteachers' perceptions of leadership in English and Welsh primary schools. Data were obtained through interviews, a staff questionnaire, observation, and document review. Findings indicate that through shared leadership, headteachers saw their role as creating an empowered community of educational leaders, each committed to practice and professional development. Leadership was practiced as a strategic alliance. Their new concepts of leadership included a new negotiation of their instructional leadership role in a time of increasing managerial imperative, leadership constructs based on a clear sense of "other" rather than a focus on oneself, and professional characteristics that contributed to the development of a team. The data suggest that the headteachers felt closely aligned with their enactment of leadership while also feeling separate from the role. They spoke of new alliances formed within and outside the school, and about how leadership was enacted and shaped in the context of other colleagues. Two figures are included. (Contains 76 references.) (LMI)

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Reshaping the Headship in England and Wales: Primary Impacts

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"We need to know far more about leadership as an everyday construct –
what people mean by it and how they recognize it."

(Bryman, 1986, p. 198)

Introduction

This paper presents data gathered from a qualitative case study of three English primary headteachers[1]. This study (Portin, 1995) develops a qualitative understanding of the domain of primary headteachers, with particular emphasis on how they are negotiating meaning with the various leadership responsibilities of headship. Particularly, what are the underlying personal conceptions of leadership held by headteachers during a period of significant systemic reform.

The nature of reform in England and Wales

In the midst of the political turbulence of the 1980s and 1990s, public education has been swept along by a series of reforms, each designed to right perceived deficiencies of education. Perhaps, none so dramatic on a national scale as the educational reform actions which have occurred in England and Wales. Simultaneously, while the reforming of education has occurred–as evidenced in the development, implementation, and assessment of the National Curriculum, local management of schools, new governance arrangements, and a general pervasion of marketization in education–the role of the individuals who guide schools has also been shaped.

It is important to note that a number of the reform strategies, particularly as evidenced in the devolution of managerial authority to the schools, is not limited to England and Wales. The central characteristics of marketization, "national standards," accountability for educational outcome, and the preparation of teachers are themes which find resonance in a number of different countries (Fowler, 1995). Similar reform efforts have occurred in New Zealand (Gordon, 1992) and are apparent in the United States as well. In the United States, the Chicago site-based reforms and experiments nationwide in charter school initiatives, as well as general

[1] "Headteacher" is used synonymously with the American equivalent, "principal".

devolution of responsibility, have substantially altered the leadership and managerial activites of schools.

However, educational reform in England and Wales, is the focus of this paper. Weindling (1992) has noted the political nature of the educational reforms in England and Wales. Whatever the political intent[2], be that the disempowering of LEA leadership (Williams, 1995) or simply a belief that decisions are truly best made at a local level, there have been significant effects on the way that headteachers enact their role.

What of school leadership?

While the reform of the system of education has been undertaken, little attention has been paid to the role which school leadership takes in that reform. The various aspects of the Education Reform Act of 1988 have been the clear focus of attention; including the components of the National Curriculum and its attendant assessments, financial provision through local management of schools, inspection, school choice, and various other structural elements.

School leadership, however, continues to be widely held to be crucial to school reform, if not school effectiveness (Austin & Reynolds, 1990; Leithwood, Begley, & Cousins, 1994; Pocklington, 1993). Although some of the literature speaks toward the audience of American principals, I suggest that the preponderance of similarities between the critical responsibilities of American principals and British headteachers renders a sympathetic imperative.

As stated by Lipham (1981):

> While schools make a difference in what students learn, principals make a difference in schools. This is recognized by scholars, researchers, journalists, practitioners, parents, citizens, and even politicians. They have all found that the local school is the key to educational improvement and the leadership of the principal is crucial to the school's success with students. The principal as head of the school, which is a social system, has great potential to refine or renew its educational program. (Lipham, 1981, p. 1)

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[2] The nature of the educational reform has been discussed as presenting an interesting paradox (Ball & Bowe, 1991; Kogan, 1994) . On one hand there is the centralization of power as represented in curricular decisions (i.e. the National Curriculum), and a devolution of responsibilities for many of the managerial aspects of school governance. This is an interesting political study, but beyond the scope of this paper.

Therefore, the question raised is what of school leadership during this time of reform? What do we know about the way in which headteachers conceptualize a role which is experiencing change on a large scale?

In addition, there has been a lack of systematic research into the primary headship (Coulson, 1990; Southworth, 1995). The weight of emphasis, at times, has fallen toward secondary headship, especially in terms of managerial functions and the role of leadership in large multi-staff schools (Rutter *et al.*, 1979). This study aims to help fill a gap in the school leadership literature, specifically in that which illuminates the primary school headship.

One of the ways in which school leadership has been understood has been through the roles that headteachers hold. These roles include such matters as work with staff evaluation and supervision, financial management, community relations, articulation of the national curriculum, and cross-phase transition. These lists of key actions of headteacher practice find their way into the *school effectiveness* literature (Chapman, 1993; Reynolds, 1990; Reynolds & Cuttance, 1992).

This is only one way to view headship. Another important way is through the broader lens of *leadership* and the way in which leadership as a construct is understood, integrated, and developed among individuals who hold the important role of headteachers.

Aims and Purposes of the study

As noted at the beginning of this paper, I assume not only that school headship is a position which has the potential for significant impact on the effectiveness of the school, but also that there are traditional sets of roles, norms, and values which have defined headship in the past. This is important because of the shaping nature of these traditional roles on the individual conceptions of leadership held by the study participants.

The study addresses a number of questions, the central question being: How do primary headteachers conceive of the central construct of "leadership" in the enaction of their role? Related to that, I posed a number of additional questions which are listed in Figure 1.

Figure 1: Research Questions

- *How has the primary headship changed since implementation of educational reform?*
- *How do headteachers, perceived as effective, think about and enact leadership in their schools? How do primary headteachers lead their school communities through times of change?*
- *And, what influences are pertinent to headteachers as they continue to reflect upon and negotiate what leadership means in the contemporary context?*
- *What factors have contributed to the headteacher's conceptualization of leadership and reflective style?*
- *What are the categories of events and issues that occupy the headteacher's reflection?*
- *What are the dominating personal constructs of the headteacher which contribute to the headteacher's conception of leadership?*
- *What are the cognitive antecedents of leadership, reflection and transformational leadership?*
- *What is the mechanism of headteacher consideration/praxis, especially in leadership in innovation? What is the theoretical base which informs that praxis?*
- *What are the characteristics of the "reflective moment" for the headteacher?*
- *Are headteacher thinking and decision making regarding school development and innovation conscious and a reflective discipline? Or, is headteacher's thinking largely tacit?*
- *Is the traditional "cyclic" heuristic of reflective practice supported in headteacher cognition about transformational leadership activities?*

Viewing leadership

There are, of course, a multitude of ways to view the term *leadership*. The theoretical framework from which this study operates draws a distinction between *traditional* and *transformational* models of leadership. The traditional models, including trait approaches, situational approaches, contingency models, human relations models, and so on, are reviewed quite thoroughly in a number of sources (Bush, 1986; Foster, 1986; Hughes, 1990; Watkins, 1986; 1989). For this study, transformational models (Burns, 1978) form the context.

Finding its origin in business leadership theory, transformational leadership has found a fertile ground in the development of educational leadership theory and the work of a number of theorists, including Mitchell and Tucker (1992), Foster (1989), Murphy and Hallinger (1992; 1993), and Sergiovanni (1990; 1991). In reviewing the recent literature, it is clear to see that transformational leadership has held sway in a manner, perhaps, unrivaled by other models. Transformational leadership's extended currency in the domains of business and education

remains powerful to this day. It is my view that the retained relevance of transformational leadership theory has been due to the emphasis on values, power sharing, and empowerment which pervade transformational thought.

Sergiovanni and Starratt (1993) note five attributes of this type of transformational leadership:

1. It is grounded in essential meanings about human persons, society, knowledge, growth, learning and schooling.
2. It is energized by a vision of what education might and should be.
3. It involves the articulation of that vision and the invitation to others to a communal articulation of a vision of schooling that all can embrace.
4. It seeks to embody the vision in institutional structures, frameworks, and policies.
5. It celebrates the vision and seeks its continuous renewal. (p. 188)

The power and promise of transformational leadership in a time of systemic reform make it an interesting platform from which to study leadership in contemporary settings. This provides a foundation for this study and responds to calls for a qualitative understanding which illuminates the relationship between leader and follower (Grace, 1993; Hughes, 1990).

Methodology

General methodological orientation

This research falls under the broad categorization of qualitative case study research. In the early stages of planning I had to make a number of choices in light of the questions posed and the nature of the data desired. An emphasis on the questions asked as a guiding feature of research planning is reiterated by a number of other researchers (Johnson, 1984; Hitchcock & Hughes, 1989; Merriam, 1988). Merriam (1988) identifies three points for strategy consideration as, "*The nature of the research questions... The amount of control...* [and] *the desired end product*" (p. 9). Of the three, greatest emphasis is often placed on the first point, the research questions (Yin, 1989, p. 19).

It is for the reason of exploring the nature of the primary headship as viewed by the headteachers, and the desire to build a "thick" description (Guba & Lincoln, 1981) of the headship that I chose

case study research. It proved to be an interesting, if taxing way to gather a great deal of data associated with individuals' conception of their role.

Units of analysis

The primary headteachers are the unit of analysis for this study. In all, four headteachers participated in the study; one in a pilot study and three comprising the main studies.

Certain assumptions were placed on the selection of the headteachers. These included:

a. Headship of a *large* primary school (greater than 250 pupils). The interactive nature of complex communication in a multi-staff school was one aspect that I was interested in examining.

b. Reputation for *effectiveness* as a headteacher. Effectiveness was determined through peer and expert identification. Through preliminary interviews with many headteachers, Local Education Authority (LEA), and education tutors at teacher training universities, I was able to gain triangulatory data on perceived effective heads in the county.

c. *Experience* as a headteacher. I looked for individuals who had at least five years of experience as headteachers. Generally, novice headteachers have the compounding variable of being new to and learning the role.

Given the constraints of 43% refusal rate for participation, the sampling strategy can best be described as *opportunity sampling*. Fourteen headteachers were interviewed for an hour and seven met the above three criteria and were approached with a request to participate in the full study–to which four agreed. All four of the study participants were male headteachers. I would have preferred to have had a balance of genders, but only two of the eleven heads initially interviewed were female heads of schools which met all the above criteria.[3]

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[3] Of eight headteachers visited with enrollment exceeding 250, six were male heads and two female heads. This appeared to be the general nature of primary headship in Oxfordshire, with large schools predominated by male heads. This reduced the opportunity sample of the study. In the end, a gender imbalance is a weakness in this study and will be important to address in further research.

The three headteachers who participated in the three main studies were all experienced heads with a range of seven to seventeen years of experience.

Research strategies

Yin (1989) cites six sources of evidence for case studies: "documentation, archival records, interviews, direct observation, participant observation, and physical artifacts" (p. 84). In selecting from these sources of evidence, it is the central questions of the study that guide the choice in methods of data collection.

In this study, I selected five sources of evidence as the best means of data collection: interviews with the headteacher, deputy headteacher and a sample of teaching staff; a staff questionnaire; repertory grid technique (Kelly, 1955; 1970) with the headteacher; non-participant observation; and review of relevant documents.

The advantages of using multiple methods of data collection is well-supported (Denzin, 1978; Patton, 1990). Multiple methods amount to one form of triangulation, which strengthens the validity of the study, and "is a recognition that the researcher needs to be open to more than one way of looking at things" (Patton, 1990, p. 193). The type of triangulation I used is "methodological triangulation" (Patton, 1990, p. 187), which represents the use of multiple methods, by the same researcher, to gather data. I believe that the questions of the study are too complex to be answered by a single method.

Pilot study

The pilot phase of this study was conducted between September and December of 1993. The importance of the pilot study is reinforced as essential means for checking virtually every aspect of a study design, its instruments, pacing, and researcher-participant interaction (Oppenheim, 1992). As noted by Yin (1989), "The pilot case study helps investigators to refine their data collection plans with respect to both the content of the data and the procedures to be followed" (p. 81).

My intentions were to clarify the central concepts guiding the study and questions, assure that the instruments I used were adequate, assure that my orientation as a foreign researcher was as free

as possible from cultural bias, and to evaluate for appropriate time and scope of the case study design.

Main studies

The three mains studies occurred in an overlapping sequence between January and July 1994. An average of 19 visits were made to each site for an average of 56.25 hours. The schools were all within a single LEA, but from different geographic areas with an average pupil enrollment of 464. None were in an urban setting.

Analytic strategies

In its simplest form, "data analysis consists of examining, categorizing, tabulating, or otherwise recombining the evidence, to address the initial propositions of the study" (Yin, 1989, p. 105). Or, as Hitchcock and Hughes (1989) state, "the attempt to organize, account for, and provide explanations of data so that some kind of sense may be made of it" (p. 73).

In addition to my research training, I have been largely guided by the approaches of Miles and Huberman (1984) and Patton (1990). Through this research grounding, and the tools presented by the above listed sources, a research analysis plan was developed and implemented. It is the theoretical propositions of this study which served to delimit the data, influencing the scope and coverage of the analysis.

In the first case, analysis for this study proceeded during the data collection phase. This continual analysis is necessary to develop and modify the data collection strategies during data collection and to begin to develop a thick description of the situation under study (Bogdan & Biklen, 1982; Goetz & LeCompte, 1984; Lofland, 1971 [cited in Merriam, 1988]).

In the second case–analysis *after* data collection has been completed–the nature of the analysis takes on a number of different methods. In this second phase, the analysis moves from an expanding view to narrowing focus (Miles & Huberman, 1984); preparing the data in such a manner as to facilitate review and analysis. Miles and Huberman (1984) refer to this preparation as creating *data displays*.

A content analytic methodology was used in the final data analysis. Content analysis is "a multipurpose research method developed specifically for investigating a broad spectrum of problems in which the content of communication serves as a basis of inference" (Holsti, 1968; [cited in Cohen & Manion, 1989, p. 60]). Patton (1990) sees content analysis as "the process of identifying, coding, and categorizing the primary patterns in the data" (p. 381).

The method is inductive, relying on the data itself to *tell the story* rather than comparing the data to a hypothetical test. Although the early origins of content analytic application were to quantify communication data (Cohen & Manion, 1989, p. 61), the methodology itself has evolved to be much more broad in its use. The focus of content analysis, as in Glaser and Strauss's (1967) *grounded theory* approach, is to allow the data itself to determine the shape and specifics of the analysis–to generate theory from the research process itself (Glaser & Strauss, 1967. p. 6).

Although this research is not testing out research, it is also not free from a framework of existing theory. The existing formal and substantive theory (Glaser & Strauss, 1967) helps to delimit the range of the study and raises questions which guide the data collection. However, I am quite open to, and freely accept, the fact that existing models and theory may be disproved by my data. A vantage point is chosen from which to *paint a picture*, this vantage point is that influenced by existing theory, serves as a platform but is not the picture that is painted. In this way, the content analytic strategies of this study are viewed as a discourse between theoretical constructs, and post-hoc category generation.

Analytic generalization

The problems of qualitative methodology

There is a two-way problem of reality in all areas of social research; that of getting "into" the private world of understanding. Somewhere the private and public worlds of understanding is social reality, where individual meaning meets public rules and therefore forms a ground on which the researcher and the research participant can develop shared understanding. This is pointed out by Winch (1958). Winch who sees the problem of relativity as more an explanatory problem. He feels that as social researchers turn from explaining to understanding, especially the understanding of rule-guided behavior and intentions, they *understand* causes, not simply offer explanations.

Generalization

Generalizability can be regarded as the characteristic of the study which asserts a sense of *voice* beyond the confines of this study. Adelman, Jenkins and Kemmis (1984) speak of this in terms of *transcendence*. Furthermore, Yin (1989) divides generalization into two categories: Statistical generalization and analytic generalization. Yin's description is made within the context of answering traditional prejudices against case study research and he rightly identifies generalization from a single case to be a common criticism (1989, p. 21). Briefly, Yin describes the differences between the two aims of generalization as follows:

> Case studies, like experiments, are generalizable to theoretical propositions and not to populations or universes. In this sense, the case study, like the experiment, does not represent a "sample," and the investigator's goal is to expand and generalize theories (analytic generalization) and to enumerate frequencies (statistical generalization). (1989, p. 21)

The problem of generalization is one that Bassey (1984) identifies as the ability to generalize from a single instance, such as a case study, to a broader theoretical framework. Cohen and Manion (1989, p. 150) argue for the generalizability of case study research on the basis of such things as: "their strength in reality, attention to subtleties and complexities in cases", illuminating the "embeddedness of social truths"; their archival nature for subsequent reinterpretation; the public accessibility of the data; and the sense that they begin in a "world of action" and act as a step to further action. Certainly, it is the rich description, or thick description, that forms the central argument for the generalizability of qualitative case study research, such as this study, to the theoretical propositions embedded in the study.

Findings and Discussion

A number of central points were revealed by this study and are discussed in the following section. Integrated into this discussion are suggested links to current understandings of primary headship as well as the added perspectives offered from this new data. As stated at the beginning of this paper, this study was not primarily aimed at defining and describing aspects of the role change of primary headteachers; there are other studies that have helped to expand and explore the essence of role change such as Thomas and Bullock (1994). This study, in the qualitative tradition and parallel to other studies (Southworth, 1995), aims to bring light to how post holders are conceiving of their role and conceptualizing school leadership in a time of systemic change.

The two topics of role shift and conceptions of leadership are integrated and elements of both are presented. However, the specific details of role change are used as a descriptive tool in characterizing the more central questions of the study dealing with personal conceptions of leadership.

The managerial shift

Traditionally, the role of the headteacher, especially the primary headteacher, has been perceived as that of an instructional exemplar–the *head*-teacher. The changing nature of instructional leadership, particularly as influenced by a managerial imperative, is clearly evident in the data from this study. One clear area of needed managerial expertise is the financial responsibilities associated with *local management of schools* (LMS).

Financial oversight

Responsibility for the management of large budgets has become a complex and important role responsibility for primary heads (Davies & Ellison, 1990). Although each of the headteachers in this study relied on professional staff for the day to day management of funds[4] they retained, without exception, a close monitoring role for the budgetary health of the school.

The centrality and important nature of financial management was an interesting finding and one which occasionally presented a gap between espoused theory and theory-in-practice. Interview responses indicated that the heads were concerned for the efficient management of the school's budget, but went to lengths to explain that the budgetary responsibility had been largely delegated to others. They felt themselves to be more in an oversight and policy role rather than close managing of the daily operations of the budget. As one headteacher noted,

> I think a lot of mistakes were made, when, in the early days of LMS, heads certainly thought they needed to be budget experts, financial experts. Most of us don't have those sorts of skills, so the skill you do need is to make sure there is someone on your staff that has the necessary skills to do that.
> (Chadwick. Interview 4)[5]

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[4] Through the employment of a bursar or school finance officer.

[5] To ensure anonymity, the three headteachers in this study are referred to by pseudonyms. The interview number indicates which of four scheduled interviews, or unscheduled interviews, the comments are taken.

This is one instance where what they said and what they did were not always in harmony. Observation and other interview responses revealed that the heads were often very attuned, attentive to the management and planning of the budget of the school in ways more than their espousal would sometimes indicate. Clearly, they recognize the shift and increase in responsibility:

> I think there have been some fairly significant changes in the role of the headteacher over the past few years. One is to being a financial manager, or a resource manager, in a way that headteachers were not before. Yes, they managed a curriculum budget but it was an extraordinary limited budget. But, now we're... the budget for our school is likely to be in area of between three quarters of a million and eight hundred thousand pounds. And, it is quite a big difference to managing a curriculum budget back in the seventies when I came to this school which might have been five or six thousand pounds.
> (Kline. Interview 1)

On another occasion, as when the same head was recounting the morning's activities, he shared a matter which is illustrative of his overall connection to management through budgeting of the school. He reported,

> ...then, I saw our finance officer, who also covers secretarial work for the governing body, about the major part of a report to the governors next week on taught time. Took her through that because it is a fairly complicated report with a number of appendices."
> (Kline. Unscheduled interview).

Although a financial professional is employed to manage the school's budget, he was conversant with every aspect of the budget, and even provided assistance to the professional in charge. Similar attention was evident in the other schools as well.

Attention to the details of budgeting and general management indicate a shift in role, a shift in the types of activities headteachers engage in, and the degree of responsibility associated with the role. This is similar to the findings of Thomas and Bullock (1994) as well as Arnott, Bullock, and Thomas (1992) who conclude that, "the workload arising from LMS is considerable" (1992, p. 15). **With the advent of local management the essential responsibilities of the headteacher become ones which incorporate a broad range of new managerial functions, tasks, and decisions.**

Instructional leadership

As an instructional exemplar, each of the headteachers indicated their continuing belief that they were responsible for being the *head*-teacher. In other words, an exemplar of pedagogical competence and curriculum mastery. Certainly there was a range of comments reflecting that espousal, and each headteacher maintained at least a modicum of instruction time. The data suggests, as with financial management, that their espousal did not fully match with what I observed.

In most cases, I found the headteacher's instructional time to be limited and generally not timetabled. Headteachers in this study, and largely due to the schools' size, did not have a need to maintain a timetabled teaching commitment. This would not have been the case in smaller primary schools where it is necessary for the headteacher to maintain a timetabled teaching commitment.

I would suggest that this represents a significant transitional shift in headteacher conceptions of leadership. **The headteachers in this study appeared to be on the boundary between maintaining a traditional headteacher stance of close alliance with the instructional program, and a belief that their role was significantly changing towards more strategic management of the school's LMS requirements, development planning, and preparation for OFSTED[6] inspections.**

From this study, it appeared that the headteachers were in a time when their conceptions of leadership were changing. As additional aspects of transformational conceptions of leadership (Foster, 1989; Leithwood, 1992; Murphy & Hallinger, 1992) are integrated into headteacher practice there may be further shift away from a traditional model of the headteacher as the pedagogical exemplar toward a more strategic alliance building.

One source of evidence for this view from the study was the degree of shared leadership which existed in the schools for curriculum coordination and planning. In each of the three primary schools, direct curriculum responsibility was devolved to senior staff, and further to curriculum sub-groups and working parties.

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[6] The Office for Standards in Education. The organization responsible for mandatory school inspections.

One participant expressed hope that the headteacher role would not become a "super bursar", which is similar to the "chief executive" function described by Hughes (1976). Instead, the headteachers reflected a desire to assume more strategic roles of leadership, rather than becoming bogged down in the day to day demands of the managerial imperative.

It is here that the notion of reflective leadership in headship holds the greatest promise. The literature on critical reflection in leadership (Bates, 1989; Codd, 1989; Smyth, 1989) is growing and increasingly compelling. The data from this study, as headteachers reported their changing views of leadership, indicates that conceptions of leadership which embody these values are increasing. Language of critical reflection, justification of practice, and continuous growth cycles was evident in the headteacher transcripts and is discussed further in the next section.

Leadership constructs revealed

This study aimed to examine how a sample of primary headteachers in four large, reputedly effective primary schools are conceptualizing the central aspects and attributes of leadership. I made a decision early in the study planning that it could prove useful to examine the central guiding constructs which each of the headteachers espoused as part of their conception of leadership. At the expressive level, headteachers speak directly of their beliefs and central characteristics which surround the construct of leadership. The repertory grid technique provides a useful means of delving deeper into the tacit domain of *personal knowledge* (Polanyi, 1962). In terms of the research on conceptions of leadership, additional data is needed on how headteachers construe their role and interactions with staff; or as Cohen and Manion (1989) state, which constructs does he/she use to "evaluate the phenomena that constitute his world" (p. 337).

The Repertory Grid Technique was used to gain access to the central personal constructs which cluster around the leadership context for each of the participants in this study. The use of the repertory grid technique, as introduced by Kelly (1955) and further refined and explained by Bannister and Mair (1968), Bannister (1982) Fransella and Bannister (1977) and Hall (1978) is an important source of supplementary data for this study. As a key question of this study is how headteachers are shaped by their understanding of other people and how the personal constructs of headteachers shape their conceptions of leadership, the repertory grid technique represents one way to understand those perceptions.

Other studies have suggested that personal constructs guiding leadership (Southworth, 1995) may contribute to the merging of role and individual identity. As Southworth notes, "Our

substantial self if a well defended core of self-determining beliefs, Whilst these core beliefs are strongly held and protected by individuals, they are not necessarily intractable, thus the substantial self is not completely static" (1995, p. 166). If the constructs contributing to the headteachers' "substantial self" are not constant, then an examination of their central constructs around leadership in a time of managerial shift, is important.

Central guiding constructs of the headteachers in the study were generated through 12 sorts with each of the headteacher participants. Factor analysis of the rank order data was completed using a varimax rotation. From the data, two to three factors emerged for each of the participants which accounted for (in each case study respectively) 79%, 86.5%, 89.3% of the variation. I analyzed each of the elements which clustered under each factor for each headteacher for common patterns and themes which would generate a descriptive name for the factor. A summary of these factors is presented in Appendix A.

The constructs generated were associated with descriptions of *elements* (individuals) associated with the exercise of headship. Therefore, it is assumed that the constructs broadly represent those which might be associated with the leadership and headship. They are a reflection of the characteristics which are valued by the participants and how those constructs shape their view of leadership. The constructs broadly fall into categories of *personal* and *professional* characteristics.

Personal characteristics are such constructs as clear and organized thinking; other cognitive characteristics such as perspective and longer-term views, ability to maintain life balance, time management, humor, confidence, care for others, person-centered views, sensitivity, a low degree of self-centeredness, and a reflective approach.

Professional characteristic revealed as personal constructs included such things as teamwork, volunteerism, ability to build common vision and resolve disputes equitably, ambitious and generally centered more on others, both pupils and staff, than on self.

The centrality and importance of these person-oriented constructs is echoed in aspects of the leadership literature (Duke, 1986; Starratt, 1993). What is often not clear in the literature are the boundaries between role, identity, and human relations orientation. The constructs revealed through the study show a strong awareness of followership–the *team* aspects of the educational endeavor as well as in what assists in effective practice and progress toward common goals, and the urgency for open consistent communication.

Clearly, a theme which ran through each of the case studies, and which is further exemplified in their personal constructs, is a pervading focus on the human relations aspect of theirheadship. One explanation for this is through the shaping and discursive nature of headship which is predominately to do with people. Also suggestive, is the possibility that part of the reason that the headteachers nominated for this study retain a high reputation with their colleagues is due to their human-centered orientation. The full nature of the transaction between the human-centered orientation and the requirements of the headship is not fully revealed by this data, however, it suggests an interesting line of further inquiry.

What is clear from the data is that a value toward individuals, toward professional relationships based upon respect, support and accessibility were espoused values of the headteachers. In addition, these same values were seen as imperatives for leadership style and expressed often as a strength and characteristic of their school.

This person-orientation presents an interesting inquiry in a time of changing roles for headteachers. If a managerial function is increasing[7] for headteachers in post, then whether the idiographic dimension of leadership is increasing or decreasing would form an interesting line of study. There is data from this study to suggest that the headteachers in this study were resistant to forces in this direction, but were also aware that the new responsibilities of LMS forced them to be more attentive to management needs, perhaps over the needs of individuals, at times.

Self-awareness of leadership and leadership constructs

From the study data, I was interested to discover what the headteachers said regarding their role, their perception of their role, and the influence and interaction that had with their perception of identity.

In Southworth's (1995) case study, the conclusion was drawn that the headship was more than simply a role, but actually served as an identity. Bottery (1992) also speaks to an historic sense of "L'école, c'est moi"[8], and suggests that, "where history has set a particular background, it can constrain the imagination, and prevent awareness of other possible forms of leadership" (p. 179).

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[7] Due to the demands of LMS.

[8] An adaptation from Louis XIV, cited by Bottery (1992, p. 179)

It seemed important to see if the data from this study would suggest the same conclusion. The headteacher in one school made the following insightful comment with regard to his views of the headship and his role in the school.

> Chadwick: I suppose I don't feel really like a headteacher if you push me on that one. Because I've played so many roles, I feel more of an "educator", whatever that means.
>
> Portin: Doing a headteacher's...
>
> Chadwick: Doing the headteacher's job at the moment. I don't really feel as I'm a headteacher.
>
> In fact, if someone asked me what I do I tend to pause before I answer that question. Whereas in my second headship I would have answered immediately, "I am a headteacher".
> (Chadwick. Interview 1)

And later,

> Chadwick: I don't, actually, look on this school as my school, which is interesting... loaned to the school to do a job... I don't identify with it totally. I try to keep inside it, but outside it at the same time. Which wouldn't be how some of my staff would see it, who have been here a long time, they would be much more in the thinking that this school is them, they are it...
> (Chadwick. Unscheduled interview)

Further interview data would seem to suggest that the headteacher viewed himself in a totality, which involved the headship as a role, and a role which consumes a great deal of energy, but not a totality which is defined by the headship with the other aspects of his personality and interests fitting into that.

For the headteachers in this study, the central constructs revealed a strong sense of "other" and person orientation, which are, perhaps, imperatives for effective school leadership. However, largely through espousal, the headteachers in this study appeared to be **invested yet separated** from their role.

<u>Empowering leadership</u>

Empowerment, as a leadership concept, has a number of aspects, as well as a great deal of current attention (Glickman, 1990). Empowerment as a leadership action has been considered

from the dual perspective of empowering the individual and empowering the group (Hart, 1990). In addition, empowerment has been presented as a connective activity of leadership–connecting the individuals within the organization to the goals and aspirations of the organization (Bottery, 1992). Reitzug (1994), indicates three types of empowerment in leadership behaviors:

- *Support*, or "Creating a supportive environment for critique" (p. 292);
- *Facilitation*. or "Stimulating critique" (p. 297) through the leader's visibility and initiation of questions; and
- *possibility*, "Making it possible to give voice by actualizing products of critique'
- "tangible and intangible resourcing" (p. 299).

In summary, Reitzug shapes his explanation of empowerment as a shift in the locus of control in the school from the principal to teachers. "The principal's role shifts from prescribing substance to facilitating processes in which substance can be discovered" (p. 304). Empowerment is observed as a predominant element of the 1990s (Murphy & Hallinger, 1993) which capitalizes on the decentralization efforts that are present in educational reform in a number of countries.

Empowerment was clearly in the minds of the headteachers in this study. Generally, issues of empowerment were centered in two areas: empowerment of faculty leadership in the instructional program and management of the school, and empowerment of individuals for the purposes of professional growth.

All three of the headteachers in this study had developed management teams in their schools. The management teams, usually comprising the headteacher, deputy, and senior or teacher representative. The management teams met regularly and were intricately involved in the implementation and ongoing development of the National Curriculum and its attendant assessments, school development planning, policy development, and preparation for OFSTED inspection.

One head spoke of the process that he went through in the exercise of empowering the management team of his school.

> We've gone through the initial stage of me being new, and certain key things having to be done. We're over that stage, we're into the stage now of teachers themselves being empowered to do things themselves. They are doing that, this year is a consolidation of getting them to work in their roles. The following year will be a good time to reflect on where, how far we've gone as a team.

(Chadwick. Interview 2)

A second area of focus for the headteachers was on the empowerment of individual members of staff in their professional development. All three of the headteachers utilized school resources to assist teachers in ongoing professional development. In some cases, this meant enabling their attendance on a course, or by bringing inservice opportunities to the school.

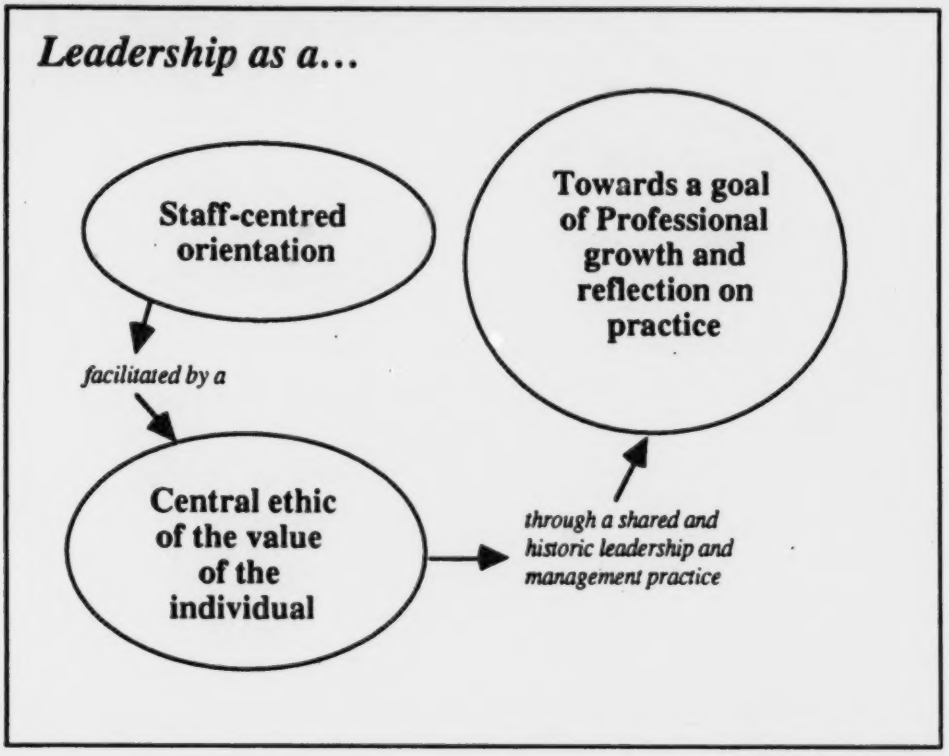
One central manner in which empowerment occurred was in the area of initiating reflection in others. The heads spoke of their commitment to creating a school where regular examination of practice was occurring, where past practices were evaluated and modified for the purposes of improvement, and as a means of countering the possible hegemonic nature of externally imposed education reform (Foster, 1986).

Reflection was built into the conceptions of leadership of these three headteachers. As one remarked:

> But I also have a belief about reflection, before you arrived on the scene to talk about it, that a part of my role, formal role as head teacher, is to enable both myself and the whole institution to be reflective. Because as an educator, I believe that change, the best change, happens when people reflect on their own behaviour and practice, and see a need, themselves, to change.
> (Chadwick. Unscheduled interview)

In the case of the second headteacher in the study, his central leadership constructs, particularly those oriented toward a human relations orientation, combined with his views and practice on the role of empowerment to create an overall impression of leadership as represented in Figure 2.

Figure 2: Headteacher's model of leadership (Kline)


Leadership as a...
Staff-centred orientation
facilitated by a
Central ethic of the value of the individual
Towards a goal of Professional growth and reflection on practice
through a shared and historic leadership and management practice

The headteacher's staff-centered approach was evident in espoused beliefs expressed in interviews; was represented in teacher comments in interviews and in questionnaire responses from teachers. This was further seen in Kline's use of time, which often centered on meeting with members of staff[9] for support and problem-solving (Fieldnote 15.3.94).

The headteacher's central ethic of the value of the individual, expressed through the "family" terminology used by the headteacher, staff, and in documentation was apparent, and pervasive in the school. This ethic could be seen to undergird many of the headteacher's leadership actions in encouraging reflection and professional development of staff.

In this study, personal conceptions of transformational concepts (Burns, 1978; Sergiovanni, 1991), particularly those engaging and encouraging reflective practice, served as a means for empowerment and redeveloped instructional leadership in the schools. **Through shared**

[9] The headteacher made a practice of visiting every classroom prior to the start of the school day to be available to staff and to greet them.

leadership in instructional leadership and school management, the headteachers in this study saw their role to create an empowered community of educational leaders, each committed to the improvement of practice and professional development.

Building alliances

Belbin (1981) found, even before the advent of the late eighties reforms, that the focus of leadership in schools had moved from singular leadership to management teams; power and authority from individuals to teams. In the nineties, the has become even more the case. Clearly, "Management is a collective endeavour." (Bell, 1988, p. 278).

In the survey research of self-nominated headteachers conducted by Bolam and colleagues (1993), the shift in singular, sometimes unilateral leadership in decision making has shifted in the post-1988 era. In their study they found that:

> All twelve headteachers espoused an essentially democratic approach to leadership and management... sought to lead in conduction with colleagues... All twelve headteachers were distinctly people-oriented–placing emphasis on interpersonal relations and on establishing a co-operative and genial climate in school.
> (1993. p. 25)

The schools in this study were organized in similar ways. Each maintained some arrangement of a "senior management team" which included not only the headteacher and deputy headteacher, but other teacher leaders as well. The decision making they were given was significant and through their leadership, staff working groups wrestled with many of the issues particularly associated with the National Curriculum, school development planning, and preparation for OFSTED inspections.

In addition, each of the headteachers participated in collegial groups of area schools. Often this included significant inter-workings in the area of staff development, development of mutually agreed admissions policies, and cross-phase transition between primary and secondary school.

The data would suggest that a developing conception of leadership is the shared nature of leadership, both inside and outside the school. In other words, **leadership as strategic alliance,** as opposed to isolated leadership.

Conclusion

This paper has examined the way that three primary headteachers in one education authority in England are conceiving of leadership in a time of system-wide change. From the qualitative data of the case studies, a number of characteristics of how these headteachers are conceptualizing leadership both as a construct and as an aspect of their role arose. I suggest that these include a new negotiation of the their instructional leadership role in a time of increasing managerial imperative; that the constructs associated with their conception of leadership included characteristics often associated with a clear sense of *other*, rather than a focus on oneself and professional characteristics that contributed to the development of a team. Both personal construct data and interview analysis suggested that the headteachers in this study feel closely aligned with their enactment of leadership in the school, but also reveal a sense of being separate from the role as well.

The quality and characteristic of the espoused leadership focused on issues of empowerment of others, both as instructional leaders and in their professional development. Closely linked, the headteachers often spoke of the new alliance that they have formed both within and outside of the school. Whether the local management team, or strategic alliances with other schools, leadership is enacted and shaped in the context of other colleagues.

There are many further questions to be answered and this research is on-going. It will be important to determine whether the espoused views, and the invested time of these headteachers, and others like them, changes over time.[10] In addition, with national elections to be held in May of this year it is unclear what changes may be in the offing if there is a change in government. Whatever the outcome, the political landscape will likely yield further changes in the education policy environment, further affecting the roles and responsibilities afforded to headteachers.

In the meantime, there remain many questions regarding the professional development opportunities and needs for headteachers. Both pre-service and inservice preparation and development opportunities for headteachers need further attention and research. Little has been

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[10] Very early analysis of interviews two years later is suggesting that the headteachers in this study are feeling a sense of what might be termed *managerial competence*. They have established efficient and trustworthy management structures and are now returning more of the balance of their time and efforts to the instructional program of the school. This may be due, in part, to the five year moratorium on curricular change which arose following the Dearing Report (1993).

done in this area which might address the leadership development needs of all who participate in primary school leadership.

In any case, this research sheds new and added light on the important role of the primary headteacher and opens the door to the possibility for emancipatory and transformational characteristics of new aspects of leadership in schools.

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Appendix A: Personal Constructs associated with school leadership

Headteacher 1: Miller/Arbridge	
Factor 1: cognitive characteristics of the individual	**Clustered constructs**: organized in thinking and planning better organized, plan with a clear goal in mind; able to organize large events, organizational skills and detailed planning; ability to learn from prior experience; intelligent, clear thinking, a wider view and perception of the whole community; deeper and clearer understanding of curriculum issues and are better equipped to explain them in a logical way.
Factor 2: perceived characteristics of effective professionals	**Clustered constructs**: able to make decisions that affect people with confidence, have a tough edge; understanding and sympathy of another's experience; strength of character; tolerant, able to smooth over rough parts with people; intelligent, clear thinking, wider view and perception of the whole community; (not having a close association; keep themselves outside the team)[11]
Headteacher 2: Kline/Warnerton	
Factor 1: professional characteristics of the individual	**Clustered constructs**: understanding of children's needs in teaching and planning; clarity of vision for education, personal vision matching a global vision; having high expectations of themselves and others; seek to find common ground in the most polarized situation; (inability, or reticence to set boundaries on ones time commitments)[12]
Factor 2: characteristics of colleagueship	**Clustered constructs**: good with adults and a desire to help; the ability to come to a quick decision and live with it; comfortable putting forward their own view; willing to take a lead in groups; underlying care for people; having high expectations of themselves and others; willing to volunteer to help and support others either individual or in groups
Factor 3: educator self-knowledge	**Clustered constructs**: work with a high level of modesty in terms of their own worth; lack of being overbearing; time management, ability to set boundaries to time commitments
Headteacher 3: Chadwick/Headleymill	
Factor 1: personal characteristics of the individual	**Clustered constructs**: sense of humor with the headteacher; open personality, easy to get along with, integrated personality, confident about themselves, sensitive; care for me as a person, total awareness of other people's thoughts and feelings, objectivity and subjectivity together; putting yourself out for someone else, doing something for somebody else, caring for others; low degree of self centeredness; highly reflective, consider problems from many points of view before giving a response, thinking deeply about issues, coupled with care; sensitivity to other people, to people's needs, wants, person-centered; depth of experience, knowledge of education based on experience
Factor 2: characteristics of professional perspective	**Clustered constructs**: ambitious in terms of professional development; greater perception of, and understanding that education lies within a wider network, responsibility beyond just school, global vision; depth of experience, knowledge of education based on experience; people who have influenced the head, receptive to their influence; interested in child development, child-centered
Factor 3: person-centered perspective	**Clustered constructs**: looks at how the individuals are within the school, concerned with individuals within the school; interested in child development, child-centered

[11] These two constructs present a puzzling picture. A low correlation coefficient and the lack of a clear picture as to what the informant was thinking render their inclusion inconclusive.

[12] Another puzzling result. A negative *r* suggested that the contrast pole (listed in Table 1) should be clustered under the factor. A low correlation coefficient renders it inconclusive. The emergent construct of time management skills would be a closer link to the themes of this factor.